

CY2008 Strategic Planning/Performance Reporting /Budgeting Worksheet

<u>Month</u>	<u>Strategic Planning</u>	<u>Performance Reporting</u>	<u>Eight-year Academic Programs Plan (semi-annual cycle)</u>	<u>Budgeting</u>	<u>Proposed Legislation</u>
Jan		-The SBOE reviews NWCCU accreditation results as available.	-Higher Education institutions hold regional meetings and begin drafting a regional plan for academic and professional-technical program offerings over the next 8 years.		
Feb			- Institutions continue to cooperatively draft regional plans.		
Mar	<p>-<u>Special</u> SBOE strategic planning meeting to review legislative requirement, previous Board plans, and set course for the current planning cycle. At this time the SBOE will conduct a self-evaluation of its own performance and revise, as necessary, its policies to ensure the SBOE continues to operate in an effective and efficient manner. In <u>late-March</u> SBOE/OSBE provides <u>strategic planning guidance</u> to the agencies and institutions.</p> <p>-Agencies and institutions start updating (and reformatting, if required) their strategic plans.</p>	-As part of the strategic planning <u>special</u> meeting, SBOE reviews previously used performance measures and benchmarks providing guidance for the current reporting cycle.	-Institutions (all regions) meet to conduct a statewide needs assessment for academic and professional-technical program offerings over the next 8 years.		
Apr	<p>-SBOE is briefed on next FY legislative appropriations and new legislation as it impacts SBOE governed agencies and institutions.</p> <p>-SBOE reviews and approves SBOE strategic plan (revised format and a new year added).</p> <p>-SBOE receives final DFM strategic plan guidance (for</p>	<p>-In <u>April</u> SBOE/OSBE provides performance <u>measure/reporting guidance</u> to the agencies and institutions. Agencies and institutions will provide anticipated performance measures to OSBE.</p> <p>-<u>Early-April</u> agencies and institutions submit <u>proposed</u> performance measures/benchmarks (including continued use</p>	-Institutions share their respective draft 8 year plans with OSBE and the other institutions.	-SBOE is briefed on next FY legislative appropriations and new legislation as it impacts SBOE governed agencies and institutions.	
				-SBOE provides <u>budget guidelines</u> (including <u>line</u>	

	governed agencies and institutions).	of current measures, if appropriate) for review/approval by SBOE. -SBOE/OSBE receives final DFM performance reporting guidance (for governed agencies and institutions).		items) to the agencies and institutions.	
May	-Presidents and agency head evaluations and review of institution/agency performance, strategic plan development, and goals for next four years. -Agencies and Institutions continue updating their strategic plans for submission to the SBOE prior to June agenda cutoff.	-SBOE reviews and approves agency and institution <u>proposed</u> performance measures and benchmarks. -Agencies begin collecting performance data (state fiscal year) for inclusion in their FY 2008 performance report.		-Agencies and institutions submit estimated <u>line items</u> to OSBE prior to June Board agenda cutoff.	-Agencies and institutions notified to submit legislative ideas and suggestions to OSBE prior to June Board agenda cutoff.
Jun	-SBOE reviews and approves updated agency and institution strategic plans.	-OSBE approves agency and institution performance standards.	-Institutions meet to formally present their 8 year plans.	-SBOE provides <u>budget MCO guidelines</u> to the agencies and institutions. -OSBE provides guidelines and budget template to agencies and institutions for MCO submission (prior to August Board agenda cutoff). -SBOE reviews and approves agency and institution <u>line item</u> requests.	-SBOE reviews, approves, and provides guidance concerning <u>proposed</u> agency and institution legislative ideas.
Jul	-OSBE submits SBOE approved agency and institution strategic plans (revised if required by the Board) to DFM by the <u>early-July</u> deadline.	-The SBOE reviews NWCCU accreditation results as available.	-Institutions meet to coordinate and finalize their 8 year plans for presentation to the Board in August . -OSBE staff verifies 8 year plans are compatible with institution role and mission, SBOE strategic plan and performance reporting.	-Agencies and institutions submit estimated MCO budget to OSBE prior to August Board agenda cutoff.	
Aug		-Agencies and institutions submit agency and institution performance reports to	-Final 8 year plan for academic and professional-technical program offerings	-SBOE reviews and approves <u>final</u> budget request for	-OSBE submits legislative ideas to DFM prior to the required

		OSBE in <u>late-August</u> .	presented to the Board for approval.	next FY. -Draft budget request input to DFM automated system (by agencies and institutions) with a copy of supporting materials sent to OSBE. -OSBE reviews agency and institution budget submissions to ensure compliance with SBOE guidance. -In <u>late-August</u> all budget documents returned to OSBE for final submission to DFM and LSO.	<u>early-August</u> deadline. -Governor's Office and DFM review legislative ideas. -OSBE begins development of approved legislative ideas into draft legislation (as appropriate).
Sep	Board conducts a self-assessment.	-OSBE submits approved agency and institution performance reports to DFM by the required <u>early-September</u> deadline.		-Final budget requests forwarded to DFM and LSO by the <u>early-September</u> deadline.	-Proposed (final draft) legislation is due to DFM about <u>mid-September</u> .
Oct	-SBOE reviews Board's strategic plan. -SBOE reviews self-assessment and makes recommendations for improvements.	-SBOE reviews performance data from institutions and agencies for the previous year. Review forms the basis for revising strategic plan.		-SBOE strategic planning summit includes financial outlook and impact of the zero-based budgeting initiative.	-Proposed legislation is approved by the SBOE. DFM forwards to LSO by <u>mid-October</u> .
Nov	-Staff develops and finalizes (in collaboration with the agencies and institutions) the next annual update to the strategic plan.	-OSBE updates performance measures to align with the Board's strategic plan.			-Proposed legislation in <u>bill format</u> returned by LSO to OSBE for review and final changes.
Dec	-SBOE review and approves the annual updated/revision to the strategic plan for the next FY.	-SBOE/OSBE approves performance measures for the Board and OSBE's strategic plans. This includes those based on the review of self-assessment.			- <u>Early-December</u> is the final date for changes to legislative proposals. Bills with substantive changes are resubmitted to SBOE for approval.